

CUSOURCE[®]
Employee Training

Instructor-Led Catalogue

Updated: September 2011

The Instructor-led courses offered in this catalogue can take place in a traditional classroom setting and/or online. Many of these courses may also be offered in-house, specifically for your organization.



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Content Index

Please note that courses within each category are listed in alphabetical order, not skill-development order.

Agricultural Lending	1
Advanced Agricultural Financial Statement Analysis	1
Agricultural Credit Problem Account and Collections	1
Agricultural Financial Statement Analysis	1
Agricultural Lending (CU00-346) Exam Preparation	2
Commercial Lending	3
Advanced Commercial Lending	3
Analyzing the Commercial Borrower’s Industry, Market and Competitive Risk	3
Applied Commercial Lending	3
Applied Commercial Loan Administration*	4
Cash Flow Refresher for Experienced Lenders	4
Commercial Lending (CU01-345) Exam Preparation	4
Commercial Loan Collection	5
Identifying and Managing Deteriorating Commercial Risk.....	5
Introduction to Business Financial Statement Analysis	5
Structuring Commercial Loans 1.....	6
Understanding Business Financial Statements	6
Understanding Business Financial Statements (Facilitated Online Course)	6
Understanding Your Small Business Customer.....	7
Compliance/Risk Management	8
Business Continuity Planning	8
Enterprise Risk Management for Managers	8
Financial Red Flags for Managers	9
Privacy Officer Training.....	9
Privacy Officer Training (Online Course)	9
Consumer Lending	10
Applied Consumer Lending.....	10
Applied Residential Mortgage Lending	10
Consumer and Residential Mortgage Lending Exam Preparation (CU00-210).....	11
Delinquency, Collections & Security Realization	11
Delinquency, Collections & Security Realization eClassroom <i>NEW</i>	11
Residential Construction Financing	12
Retail Lending to Self-Employed Borrowers	12
Retail Lending to Self-Employed Borrowers (Online Course).....	12

Credit Union Literacy	13
Understanding Our Business	13
Employee Engagement and Relationship Building	14
Breaking Cultural Communication Barriers.....	14
Managing Diversity.....	14
Preventing Workplace Harassment	14
Situational Communication: Relating Styles	15
Thriving Through Change	15
Management Development	16
Effective People Management: The Science of Management.....	16
Governance and Accountability for Managers	16
Helping Others Succeed	17
Leadership Succession and Continuity:.....	17
Leading Change	18
Managing for Performance.....	18
Media Training for Credit Union Executives.....	18
Motivate and Empower Your Staff	19
Practical Project Management	19
Strategic Planning for Management.....	19
Team Building for Managers	20
Product Knowledge	21
Advanced RRIFs	21
Advanced RRSPs	21
Basics of RRSPs.....	21
Handling Estates Effectively.....	22
RESPs – The Fundamentals.....	22
Sales and Service	23
Sales Workshop	23
Service Workshop	23
Other	24
Train the Trainer.....	24

Agricultural Lending

Advanced Agricultural Financial Statement Analysis

(CU02-AAFSA)

This 4-day course provides experienced agricultural lenders with an in-depth perspective on the future of Canadian agriculture, advanced financial statement analysis, ratio analysis, risk rating, monitoring of complex credits, evaluation of business expansion, and risk assessment.

"Real life" case studies utilizing farm financial analysis software output, together with historical financial information, is used to provide information that can be used to provide production and financial benchmarks. Each case will provide an in-depth perspective on the future of agriculture, advanced financial statement analysis, ratio analysis, risk rating, monitoring of complex credits, evaluation of business expansion, and risk assessment.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-AAFSA_DES.pdf

Agricultural Credit Problem Account and Collections

(CU02-ACPAC)

This 4-day workshop is designed to enhance your skills in: early detection of farm financial problems, diagnosing farm financial difficulties, working with the farm family to solve their problems, negotiation and mediation, working with farm mediation boards, and security recovery issues.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-ACPAC_DES.pdf

Agricultural Financial Statement Analysis

(CU02-AFSA)

This 4-day course provides new or existing agricultural lenders with the skills needed to undertake agricultural credit analysis, loan structuring, monitoring, and the management of problem loans.

The course material is taught using cases studies and background material.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-AFSA_DES.pdf

Agricultural Lending (CU00-346) Exam Preparation

(CU02-AG)

This 4-day classroom course is an exam preparation course for the 10 module independent study CUIC-346 Agricultural Lending course, which addresses factors and issues associated with agricultural lending.

For additional information, please see the course description:
www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-AG_DES.pdf

Commercial Lending

Advanced Commercial Lending

(CU02-ALC)

Building on the abilities of experienced lenders, this intense two-day course focuses on commercial lending from a strategic perspective. This course relies heavily on class participation and real-life case studies that reflect the challenges facing individuals with senior level responsibility and experience. This 2-day offering is part of several CUSOURCE Credit Union Knowledge Network lending designation programs – please see the CUSOURCE® Learning Management System for more information.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-ALC_DES.pdf

Analyzing the Commercial Borrower's Industry, Market and Competitive Risk

(CU02-ACBI)

This 1-day course is designed to provide credit and lending professionals with a foundation on which to base sound credit decisions derived from non-financial statement analysis. Through a combination of case studies, analysis and various learning activities, you will have the opportunity to enhance your skills and knowledge in credit risk analysis. The Canadian edition of this course is offered through a partnership between CUSOURCE Credit Union Knowledge Network (CUSOURCE Knowledge Network) and The Risk Management Association (RMA).

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-ACBI_DES.pdf

Applied Commercial Lending

(CU02-CMLP)

This 3-day, case-based course reinforces the fundamental concepts, skills, and behaviours required to make sound commercial lending decisions. Participants will demonstrate their knowledge of commercial lending through guided discussion, practical application and group presentations. Discussion will include security, documentation, and emerging issues in commercial lending. Participants are encouraged to bring discussion items and share experiences with other lenders and the facilitator.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CMLP_DES.pdf

Applied Commercial Loan Administration*

(CU02-CLA)

Through group work and discussion, participants will review the commercial lending process and then, examine in depth, the commercial lending administration function. By the end of this 2-day case-based course, participants will know what information and supporting documentation is needed to process various types of commercial loans and how to monitor loan performance.

*Please note this course is currently under re-development.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CLA_DES.pdf

Cash Flow Refresher for Experienced Lenders

(CU02-CFREL)

This 1-day course is designed for experienced credit and lending professionals interested in a refresher in the fundamentals of cash flow with an emphasis on UCA cash-flow lending. You will have the opportunity to enhance your analytical skills in evaluating credit risk through a combination of case studies, analysis and review of general principles of cash flow construction and analysis. Two aspects of cash flow analysis are discussed: reviewing sources and uses of cash and using the direct approach to construct and analyze cash flow statements. The Canadian edition of this course is offered through a partnership between CUSOURCE Credit Union Knowledge Network (CUSOURCE Knowledge Network) and The Risk Management Association (RMA).

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CFREL_DES.pdf

Commercial Lending (CU01-345) Exam Preparation

(CU02-CL)

This 4-day course provides participants with an excellent opportunity to review core principles of commercial lending and their applications, and to prepare for the final exam for the *CUIC*® Commercial Lending course, CU01-345.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CL_DES.pdf

Commercial Loan Collection

(CU02-CLC)

This 3-day course is designed to assist commercial lenders, collection employees and commercial loan managers with mitigating risk and preserving the quality and profitability of their loan portfolios. Participants leave with facts and tools that they can apply as soon as they return to their credit union.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CLC_DES.pdf

Identifying and Managing Deteriorating Commercial Risk

(CU02-MDCR)

This 1-day offering will be of particular interest to experienced lenders who possess a basic understanding of commercial loan risk and are interested in early identification and detection. Participants learn the importance of having a process to deal with deteriorating commercial risk; identifying early warning signs and developing an end-to-end process. The course also covers the tools required for identifying, managing and reporting commercial risk.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-MDCR_DES.pdf

Introduction to Business Financial Statement Analysis

(CU02-IBFSA)

This 2-day course will help the new commercial or business lending officer to learn to read and analyze various financial statements and ratios from a lender's perspective. It will also assist with assessing a business's financial picture and enable the lender to make better informed credit decisions.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-IBFSA_DES.pdf

Structuring Commercial Loans 1

(CU02-SCL1)

This 1-day of course is designed to provide credit and lending professionals with an understanding of the fundamental principles of successful loan structuring. Through a combination of case studies, analysis and various learning activities, you will have the opportunity to enhance your skills and knowledge in structuring credit exposures, matching loan type and identifying underlying credit risks. The Canadian edition of this course is offered through a partnership between CUSOURCE Credit Union Knowledge Network (CUSOURCE Knowledge Network) and The Risk Management Association (RMA).

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-SCL1_DES.pdf

Understanding Business Financial Statements

(CU02-UBFS)

This 1-day course is designed to assist new or potential commercial lenders in becoming familiar with business financial statements. Due to their complexity, financial statements can be very confusing and vary substantially from borrower to borrower both in terminology and composition. This course will review and provide you with a clear understanding of the various financial statements, their components and inter-relationships, including; the income statement, the balance sheet, the statement of retained earnings and the statement of sources and applications of funds.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-UBFS_DES.pdf

Understanding Business Financial Statements (Facilitated Online Course)

(CU05-UBFS)

As a facilitated online course, the material is covered in 2-hour sessions in 4 consecutive days. Like the classroom delivered course, this course is designed to assist new or potential commercial lenders in becoming familiar with business financial statements. Due to their complexity, financial statements can be very confusing and vary substantially from borrower to borrower both in terminology and composition. This course will review and provide you with a clear understanding of the various financial statements, their components and inter-relationships, including; the income statement, the balance sheet, the statement of retained earnings and the statement of sources and applications of funds. The course will also be of interest to retail lenders who want a clearer understanding of how to determine income for self-employed members. The Statement of Business Activities is covered in depth in the final module.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU05-UBFS_DES.pdf

Understanding Your Small Business Customer

(CU02-USBC)

This 2-day course gives you an opportunity to develop and enhance skills that will enable you to work more effectively with existing and potential small business members. You will learn techniques that positively impact your relationships with members including: improved interviewing skills, how to describe products and initiatives with member-focused messages, and how to decline credit without alienating the member. The Canadian edition of this course is offered through a partnership between CUSOURCE Credit Union Knowledge Network (CUSOURCE Knowledge Network) and The Risk Management Association (RMA).

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-USBC_DES.pdf

Compliance/Risk Management

Business Continuity Planning

(CU02-BCP)

If the H1N1 flu hits your credit union this winter, will you be able to continue 'business as usual'? This two-day session is designed to provide credit union's the information and tools they need to keep their business safe and plan for the worst. Business Continuity means understanding and protecting everything involved in making your business function. This includes people, locations, products or services, processes, customers or clients, documents, IT and telecommunications. Most interruptions CAN be avoided. For those that cannot, you CAN reduce the risk and impact while keeping your business functioning. Despite the knowledge and urgency for widespread business continuity planning, many organizations find themselves still unprepared. Are you ready?

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-BCP_DES.pdf

Enterprise Risk Management for Managers

(CU02-ERM)

This 1-day workshop will build on the foundation of the standards of sound business and financial practices in the Financial Service Industry. Join other responsible Credit Unions, to address concerns with developing an approach to managing risk which builds on the concepts of Enterprise Risk Management.

Credit unions are all about serving their members' needs while taking risks. Every transaction and each decision taken has a risk element to it. How do "well run" financial institutions identify, organize and measure risk? What risks are important for credit unions to explicitly manage?

Participants will benefit from hands-on case work as well as instructional format. The workshop is not limited to credit risk and expands to include regulatory risk, operating risk, and reputation risk. You will focus on risk that is important to manage, not risk that is easy to manage. You will discover the concepts of ERM along with the standards of sound business practices.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-ERM_DES.pdf

Financial Red Flags for Managers

(CU02-FRM)

This carefully designed 1-day offering will strengthen your ability to use financial information to support the Board of your credit union. Venturing beyond basic financial statements, it will update your understanding of the new governance trends as they apply to financial rules. Its insights will help you support the exercise strategic oversight functions of the Board, recognize Red Flags and challenge assumptions. While you renew the strategic, ethical perspective you bring to financial reporting, you will have valuable opportunities to discuss how to forge new business relationships with your boards.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-FRM_DES.pdf

Privacy Officer Training

(CU02-PRI)

Are you aware of how significantly the privacy laws impact your credit union? Does your credit union have the necessary safeguards in place to reduce the risk of a privacy or security breach? Through a 1-day instructor-led course, self-assessment activities, group discussion and review of legislative changes and recent cases/investigations, you will gain valuable insight into the importance of privacy compliance and the crucial policies and procedures that credit unions need to have in place to ensure they are safeguarding sensitive information in the most appropriate manner.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-PRI_DES.pdf

Privacy Officer Training (Online Course)

(CU05-PRI)

Are you aware of how significantly the privacy laws impact your credit union? Does your credit union have the necessary safeguards in place to reduce the risk of a privacy or security breach? Through a series of 3 instructor-led online sessions, self-assessment activities, group discussion and review of legislative changes and recent cases/investigations, you will gain valuable insight into the importance of privacy compliance and the crucial policies and procedures that credit unions need to have in place to ensure they are safeguarding sensitive information in the most appropriate manner.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU05-PRI_DES.pdf

Consumer Lending

Applied Consumer Lending

(CU02-CLP)

This 2-day classroom course is for consumer lenders who have completed the *CUIC*® course *Consumer & Residential Mortgage Lending* (CU00-210) or who have two years of underwriting experience in retail credit. Through interactive discussions, group work and carefully crafted case studies, participants will gain valuable insights and confidence in applying lending concepts that utilize the 8 Cs of credit to the real-life situations members present. While the focus is on developing lending skills, it is equally on how to grow relationships so that members just keep coming back for loans and other business.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CLP_DES.pdf

Applied Residential Mortgage Lending

(CU02-RMLP)

Through interactive discussions, group activities and case studies, participants in this 2-day course will apply the foundational knowledge gained in completing the *CUIC*® course *Consumer & Residential Mortgage Lending* (CU00-210) or through their 2 or more years of residential mortgage lending experience.

This course will also position lenders to build stronger relationships with members by providing a broader knowledge resulting in increased member care. With this enhanced knowledge, lenders will be also able to identify potential business opportunities within mortgage applications resulting in greater market share in this key line of business.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-RMLP_DES.pdf

Consumer and Residential Mortgage Lending Exam Preparation (CU00-210)

(CU02-CRML-WS)

This 4-day offering provides an excellent opportunity for students to gain a foundational understanding of Consumer and Residential Mortgage Lending and its applications. It introduces students to consumer and mortgage lending, the consumer loan application process, mortgage law and mortgage insurers, the mortgage loan process and administration, security, structuring the loan, loan disbursements and monitoring, discharge and prepayment, problem accounts, member contact, and consumer lending business development.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-CRML-WS_DES.pdf

Delinquency, Collections & Security Realization

(CU02-DCSR)

This 2-day instructor-led session focuses on the required knowledge and processes within delinquency, bankruptcy and security realization to minimize the impact to the member and the credit union. Using case studies, small group work and discussion, you will work through a number of scenarios utilizing the 8 Cs of Credit and the 9 Steps in the Lending Process along with a series of checklists. You will come away with a toolkit of information that will assist you in understanding the core concepts of prevention, process, and security realization.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-DCSR_DES.pdf

Delinquency, Collections & Security Realization eClassroom **NEW**

(CU05-DCSR)

This eClassroom is comprised of four 60-minute pre-work sessions and four 90-minute WebEx sessions that take place once a week for four weeks.

The course focuses on the required knowledge and processes within delinquency, bankruptcy and security realization to minimize the impact to the member and the credit union. Through assigned pre-work reading, reflection and completion of activities, and case study assignments, you will prepare for interactive discussion, activity and case study debriefs within the four 90-minute WebEx sessions. Sequential in nature, each session builds on the other in terms of knowledge and skills utilizing the concepts of Read, Apply and Practice.

The course examines the core fundamentals in the areas of delinquency, collections and security realization and then utilizes the 8 Cs of credit, the 9 step lending process, case studies and a series of checklists to assist with applying learning.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU05-DCSR_DES.pdf

Residential Construction Financing

(CU02-RCF)

This 2-day course will be beneficial to employees who want to increase their knowledge of the residential construction financing process. The course will also highlight the many considerations, over and beyond regular mortgage financing, that pertain specifically to Residential Construction Financing.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-RCF_DES.pdf

Retail Lending to Self-Employed Borrowers

(CU02-RLSEB)

There are now more self-employed contractors and small-business owners that at any time in history. Whether due to the changing economy or the increasingly entrepreneurial spirit of younger generations, the percentage of credit union members that are self-employed is large and growing. These members may require loans, mortgages and lines of credit just like anyone else.

In this 1-day offering, you will gain valuable insight into retail lending to self-employed borrowers including key components of business financial statements, products that lenders may offer and adjudicate, and special underwriting considerations for proprietorships, partnerships and limited companies.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-RLSEB_DES.pdf

Retail Lending to Self-Employed Borrowers (Online Course)

(CU05-RLSEB)

There are now more self-employed contractors and small-business owners that at any time in history. Whether due to the changing economy or the increasingly entrepreneurial spirit of younger generations, the percentage of credit union members that are self-employed is large and growing. These members may require loans, mortgages and lines of credit just like anyone else. Through a series of **5 instructor-led online sessions**, you will gain valuable insight into retail lending to self-employed borrowers including key components of business financial statements, products that lenders may offer and adjudicate, and special underwriting considerations for proprietorships, partnerships and limited companies.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU05-RLSEB_DES.pdf

Credit Union Literacy

Understanding Our Business

(CU02-UOB)

This 1-day course will be of interest to all staff who would like to: Understand the changes occurring within the financial industry and the impact on credit union's profit, discover how the credit union earns its profits, and recognize what they can do every day on the job to positively impact profitability.

For additional information, please see the course description:
www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-UOB_DES.pdf

Employee Engagement and Relationship Building

Breaking Cultural Communication Barriers

(CU02-BCCB)

Communication is a transaction that occurs between a sender and a receiver and can be influenced by pre-existing conditions such as cultural values, attitudes, and beliefs. This 1-day course provides Credit Union employees with an opportunity to strengthen their communication and active listening skills. You will learn about verbal and non-verbal methods of communication and factors that influence the communication process. Furthermore, this course will explore the style, culture and history of Aboriginal people and their influence on the communication process.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-BCCB_DES.pdf

Managing Diversity

(CU02-MD)

This 1-day course is part of the Management Development Series. The course is ideal for managers, supervisors, team leaders or employees who wish to explore the subject of diversity awareness and how to manage wide ranging diversity of their workplace. Participants will explore attitudes, perceptions, beliefs and values concerning topics such as race, religion, gender, culture, age and sexual orientation.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-MD_DES.pdf

Preventing Workplace Harassment

(CU02-HAR)

This ½ day course is designed to build and enhance your knowledge of effective strategies to effectively handle inappropriate behaviour and workplace harassment in diverse organizations. While credit unions across Canada are dedicated to providing a working environment in which all employees are treated with respect, dignity, and tact, what constitutes harassment may not always be clear.

Through a variety of learning methods including case studies, dialogue and lecture, this offering will utilize the credit union's existing policy to make the model of a harassment free workplace tangible and real in the culture of the organization.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-HAR_DES.pdf

Situational Communication: Relating Styles

(CU02-SC)

The "soft" skills are the hard skills. *Situational Communication: Relating Styles* is one of the most successful interpersonal skills seminars in North America. For the past 20 years, this proprietary program has been taught to executives, managers, banking, accounting, insurance, healthcare, sales, manufacturing and hi tech professionals. They have learned how to use their strengths to control high impact interactions for "results and enhanced relationships".

The 2-day *Situational Communication: Relating Style* offering is research-based and conceptually integrated, highly participative and interactive using simulations, case studies and behavioural profiles and 360° feedback to facilitate learning. The seminar is based on a systematic, developmental approach to high impact interpersonal interactions. Participants learn how to size up a situation quickly and select the most appropriate relating style to reach a successful and effective outcome. The seminar helps people develop the confidence, knowledge and skills necessary to control high impact interactions in a fair, firm and friendly manner.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-SC_DES.pdf

Thriving Through Change

(CU02-TTC)

It has been said that the only constant in our ever-changing world, both in our personal and professional lives, is change: that it will always be here, will likely increase in frequency and, at times, intensity. Some change experts have referred to profound changes in the workplace as workquakes, which can have the same dramatic effect on people and organizations as nature's geological equivalent. In order not to become 'change statistic' individuals (and organizations), we need skills and tools to not just cope with and survive change, but to manage and thrive through change. Thriving through Change has been revised and enhanced providing employees with an entertaining and enjoyable way, through interactive participant exercises and discussions, to experience more success with less stress in times of change – at work and in life.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-TTC_DES.pdf

Management Development

Effective People Management: The Science of Management

(CU02-EPM)

This 2-day course is designed to build and enhance competencies for the vital role of the manager as “people manager.” Using the most current and proven leadership and management thinking, as well as proven best practices, this workshop provides an effective framework for directing, supporting, coaching and leading people.

At the end of this interactive and engaging workshop, you’ll be able to:

- Build and maintain the all-important relationships with your direct reports
- Perform your people management responsibilities more confidently and effectively

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-EPM_DES.pdf

Governance and Accountability for Managers

(CU02-GAM)

Board directors have the *CUDA*® Program to learn about various aspects of governance. Where do senior executives and management go to learn about governance? Right here. In this 1-day offering, you will learn what your directors do about governance and accountability, but with a management twist. The outcome: a stronger board-management team and a plan for building and maintaining a robust governance culture. You will leave the session with a clearer understanding of the *CUDA* Program, of the governance environment and with a plan that will help ensure that your credit union has “the right directors with the right skills, at the right time”. Look for other “governance for management” courses in the *CUSOURCE*® Learning Management System.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-GAM_DES.pdf

Helping Others Succeed

(CU02-HOS)

Most managers already believe in the effectiveness of coaching. The challenge is to help them become better coaches by overcoming the barriers of little/ no time, confidence, skill, priority or understanding of immediate payoffs and benefits.

Helping Others Succeed helps managers at all levels develop and strengthen their skills and practices in coaching their staff towards top performance and motivation. Participants examine the direct reports' feedback to identify specific opportunities for improving their coaching effectiveness. Managers practice dealing with common coaching situations: performance improvement, skill development and career coaching. They also receive a multitude of practical tools to help them identify and handle these situations back on the job.

This 2-day offering prepares each manager to initiate a dialogue with the two employees who provided feedback. They meet with each direct report to discuss the feedback and plan for coaching improvement. Together they agree upon a plan to make the manager a more successful coach.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-HOS_DES.pdf

Leadership Succession and Continuity: The Management Workshop “Mapping out the Plan”

(CU02-LSC)

In the present “war for talent” environment, many credit unions are facing significant challenges with respect to the recruitment, development and retention of people in the “critical for success” leadership positions. Recent feedback from credit union directors and executives reveals that many credit unions are struggling with shortages in the areas of:

- People with the right types of functional skills
- People with the necessary sales and service orientation
- People with the cultural awareness of what makes credit unions what they are
- People who have the necessary leadership capabilities to ensure continued growth and success

Leadership continuity planning and management is more strategic and more organization-wide in its application than the more familiar term succession planning. It is a human resources and governance strategy that sets out a framework for people recruitment, development and retention in order to ensure the continuity of leadership in board and key employee positions and sets the “people stage” for achieving business plan objectives.

This 1-day offering provides a solid understanding of leadership continuity planning and management – the needs, the benefits and the options.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-LSC_DES.pdf

Leading Change

(CU02-LDC)

This instructor-led course is part of CUSOURCE® Management Development Series. This course is ideal for managers, supervisors, team leaders or employees who want to learn how to effectively lead and manage important organizational changes. Students will learn how to develop a vision statement and make it a reality. In addition, you will study the importance for leaders and employees to understand their roles essential to the alignment of their goals with the goals of the organization. You will also explore topics such as motivating employees, change management, coping with uncertainty and moving forward.

This 1-day offering complements the knowledge and skills in the CUIC® Management Studies Program but is a non-credit course.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-LDC_DES.pdf

Managing for Performance

(CU02-MFP)

When you make the shift from employee to manager, new skills are required. As a 'first-time' manager or supervisors, you often continue to do many of the things you did before becoming a supervisor, while at the same time, you are expected to oversee the work of others. You need training to help make the adjustment from one role to the other. This 2-day offering is a hands-on, skills development activity. Theory presentations are followed by exercises, case studies and skill practice sessions, which allow you to apply what has been learned. You will also be provided with the opportunity to prepare a personalized action plan to bring what you have learned back to the workplace.

*Previously called "Management Essentials."

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-MFP_DES.pdf

Media Training for Credit Union Executives

(CU02-MT)

Working with the media in press, radio and television present an enormous opportunity to get your credit union's message across to the right audience. If you don't take advantage of these opportunities when they are presented, your competition probably will.

This ½ day course is designed to provide credit union executives with the information, tools and training they need to effectively communicate with the media. Learn why saying "No Comment", allowing your eyes to wander, and assuming the audience completely understands your business are things you'll want to avoid.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-MT_DES.pdf

Motivate and Empower Your Staff

(CU02-MEYS)

This 1-day course provides supervisors and managers with an opportunity to develop and enhance their leadership skills and work more effectively with staff. You will learn about transitioning from a process manager to a people leader and motivator. Furthermore, this course explores topics such as: de-mystifying emotional intelligence and making delegation work to benefit your entire team.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-MEYS_DES.pdf

Practical Project Management

(CU02-PPM)

This 1-day course is ideal for credit unions that have identified people to manage projects (either individually or in teams) who do not have a history of project management skills. The course includes post-session mentoring for each participant as they commence their project.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-PPM_DES.pdf

Strategic Planning for Management

(CU02-SPM)

One of a board's key responsibilities is related to strategic planning. How does that mesh with management's? This 1-day offering examines the board's and management's roles and responsibilities in ensuring that the credit union has a viable planning process and a "living" strategic plan. You, as a senior credit union executive or member of the management team will examine the strategic planning process and its strategic, directional and tactical components. A business simulation helps you pull all of these pieces together so that you leave with ideas about your strategic planning process. Look for other "governance for management" courses in the CUSOURCE® Catalogue.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-SPM_DES.pdf

Team Building for Managers

(CU02-TBM)

This 1½ day **in-house** workshop uses the internationally recognized *Myers-Briggs Type Indicator*® (MBTI®) tool to help individuals on a team learn about themselves and each other. Each individual then learns how to work with and apply this knowledge to bring about effective and action-oriented management teams. This workshop covers six core issues affecting teams today: communication, culture, leadership, change, problem solving/conflict resolution, and stress.

For additional information, please see the course description:
www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-TBM_DES.pdf

Product Knowledge

Advanced RRIFs

(CU02-ARIF)

This 1-day course will provide you with the background needed to explain not only Registered Retirement Income Funds (RRIFs) as a post-RRSP option but other retirement options, too. Working through exercises and current forms will give you the skills and confidence to explain to members the more complex issues related to RRIFs such as Home Buyers repayments, spousal issues, tax implications, legislative changes and other retirement options. Training beyond this course would be required for in-depth retirement counselling.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-ARIF_DES.pdf

Advanced RRSPs

(CU02-ARSP)

Experienced employees who have a good basic understanding of RRSPs and have worked two or more RRSP campaigns will find this course extremely beneficial. Participants learn the features and benefits of the Home Buyer's Plan; the many RRSP options that are available to members — including mutual funds and self-directed plans — as well as the various maturity options available.

This 1-day course also touches on the rules applying to estates, beneficiaries, income splitting through spousal plans, lump sum contributions and severance pay.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-ARSP_DES.pdf

Basics of RRSPs

(CU02-RSPB)

To help prepare you for your first RRSP season or update your knowledge with a practical course on RRSP Basics. By the end of this 1-day classroom course, you should be able to identify what is meant by individual and spousal plans. You should acquire a basic understanding of straightforward contributions, withdrawals and transfers. You should also be able to list a number of retirement income options available to members and outline the basic elements of each.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-RSPB_DES.pdf

Handling Estates Effectively

(CU02-HEE)

Do you know what you must do when a member dies? With the aging population, credit unions are handling more deceased members' accounts and estates. By the end of this 1-day course, you will have the information you need or know where to get the information you need, in order to handle a deceased person's assets and liabilities confidently, competently and impressively. You will also be able to recognize opportunities to provide exceptional service to beneficiaries and executors.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-HEE_DES.pdf

RESPs – The Fundamentals

(CU02-FRSP)

Today, Registered Education Savings Plans (RESPs) are becoming more popular now that the federal government contributes grants into an RESP to supplement contributions. By attending this 1-day course, you will understand the rules and regulations surrounding the RESP and Canada Education Savings Grant (CESG). Be able to explain the features and benefits of the various types of education savings plans to your members in order to help them identify the best option to suit their needs.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-FRSP_DES.pdf

Sales and Service

Sales Workshop

(CU02-SS-1)

This interactive workshop teaches the sales process and incorporates modern sales methods – successful relationship selling! Participants return to their environment better equipped to: develop presentations that meet the members' real needs; influence the members in moving the sales relationship forward; to empathize with and overcome any objections and close the sale with ease. Participants will have the tools to create a specific sales plan to achieve sales goals

Today, credit union employees are expected to do much more than passively accept orders for basic banking services and are asked to go beyond traditional cross selling. In fact, front-line employees are the doorway to other areas of the credit union where more in depth financial services are offered.

This session presents the basics of effective relationship selling with an emphasis on practical selling skills such as probing and listening, handling objections, and closing the sale. Participants will also learn how to identify leads and appropriately determine the needs of the member. They will be able to close the sale and guide members to other credit union colleagues for other financial advice and services.

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-SS-I_DES.pdf

Service Workshop

(CU02-SS-II)

There are two major reasons to deliver member service: relationship building and loyalty. Sales turn opportunities into new members. Service turns new members into repeat business. This session is for credit union professionals who want to make a significant contribution to their credit union's image and their members' financial success. Good personal interaction/member service skills provide you with the following benefits:

- Increases your relationship with your members
- Perform at a higher level
- Close more sales and increase smaller sales
- Improve your efficiency and reduce stress in your job
- Promotes the credit union difference

For additional information, please see the course description:

www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-SS-II_DES.pdf

Other

Train the Trainer

(CU02-TTT)

Are you confronted with and challenged by how best to meet the training needs of adult learners? This 1-day classroom course is designed to provide you with the key fundamentals necessary to plan, deliver and evaluate effective classroom and on-the-job training. You will learn about adult learning needs and different learning styles, applying adult learning principles to course design, determining course content based on needs analysis and evaluating training.

For additional information, please see the course description:
www.cusource.ca/ecms.ashx/CourseDescriptions/ILT/CU02-TTT_DES.pdf